

2023 Voice of Our Clients

Insights on the impacts of macro trends

Insights from the 2023 Voice of Our Clients

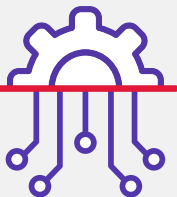




The [CGI Voice of Our Clients](#) (VOC) presents findings from our one-on-one interviews with 1,764 executives across the industries and geographies we serve. These strategic conversations provide unique insights into how organizations view the impact of macro trends, industry trends and priorities, innovation investments and more.

In this publication, we examine the most impactful macro trends for our clients in 2023. We also present a comparison of answers by European and North American executives.



CGI

Executives citing high impact* of macro trends on their organization

	Technology & digital acceleration	72%	+6pp YoY
	Changing social demographics	53%	+4pp YoY
	Fight against climate change	48%	+9pp YoY
	Reconfiguration of supply chains	29%	-1pp YoY
	Shift in the world economic order	24%	+12pp YoY

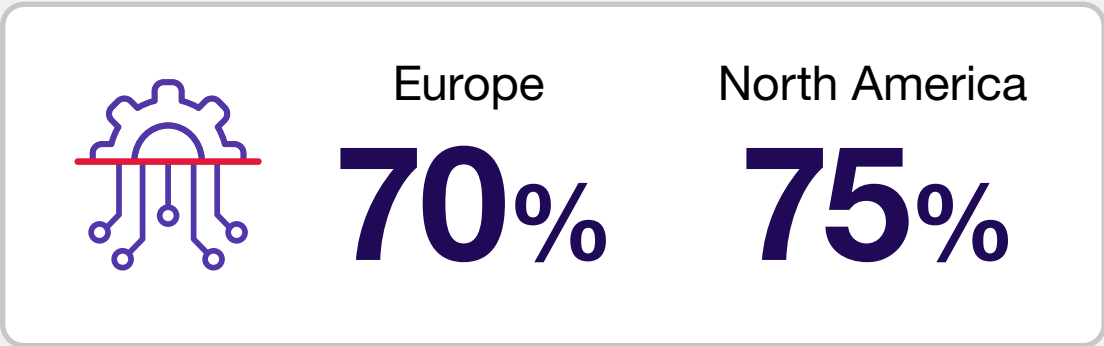
* Score of 8+ out of 10
pp = percentage points | YoY = year over year



Comparing European and North American responses

Technology & digital acceleration

Notably, rising customer and citizen digital expectations



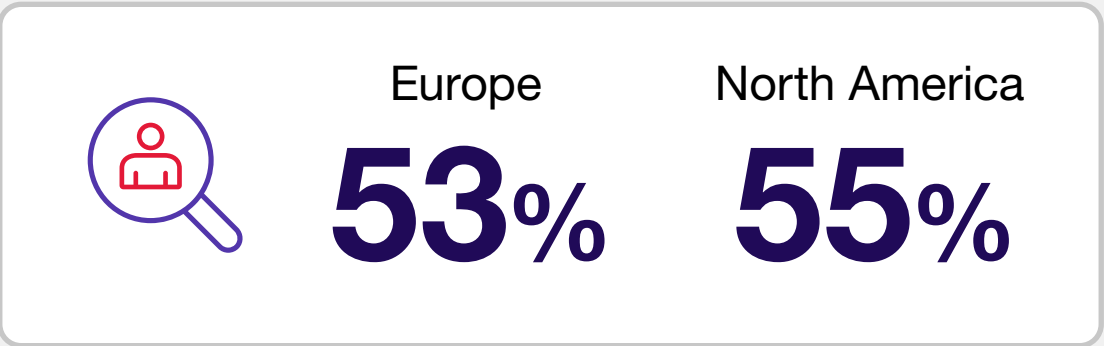
Digital acceleration offers many opportunities for growth and innovation, from creating digital value chains focused on continuous innovation to stimulating countries' growth and supporting the decarbonization of our economies.

Additional insights

While 92% of executives report having a digital strategy in place, only 30% say they are producing expected results from such strategies.

Changing social demographics

Including aging populations and talent shortages



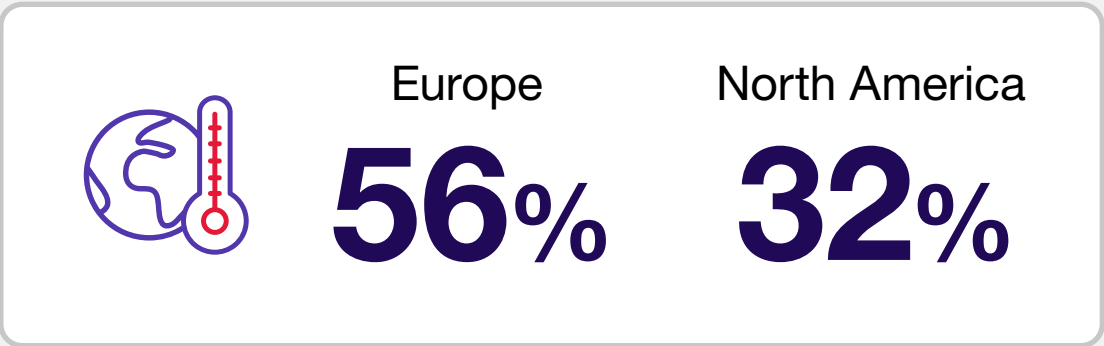
Demographic change in the Organisation for Economic Co-operation and Development (OECD) countries highlights the need to address workforce shortages, which incents all organizations to rethink the training and integration of underrepresented populations in the labor market.

Additional insights

80% of executives say they are experiencing an IT talent scarcity challenge.

Fight against climate change

Including the energy transition and the acceleration toward decarbonization



The fight against climate change is now pressuring all economic sectors to innovate and transform to comply with decarbonization targets.

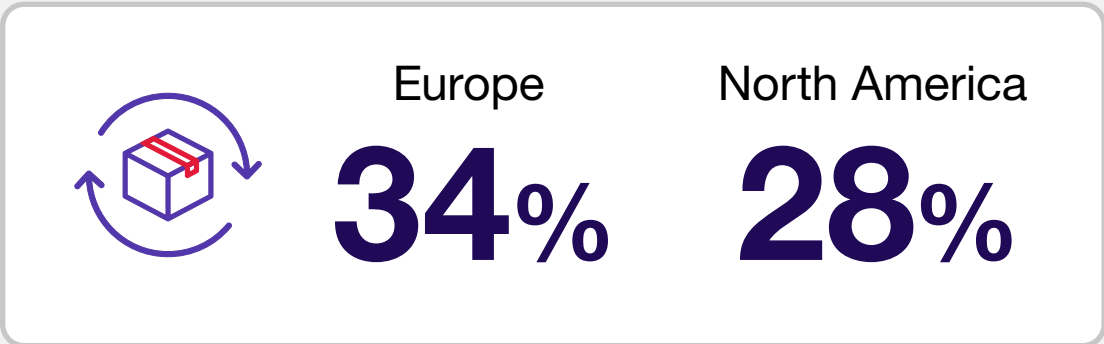
Additional insights

The above numbers represent changes of +10pp for Europe and +11pp for North America. At the same time, 55% of executives globally said sustainability is highly core to creating value for stakeholders.

Comparing European and North American responses

Reconfiguration of supply chains

To reduce risks and increase resiliency



Supply chains are adapting and becoming more resilient with the adoption of local sourcing and distribution that harnesses sustainability principles and advanced automation technologies.

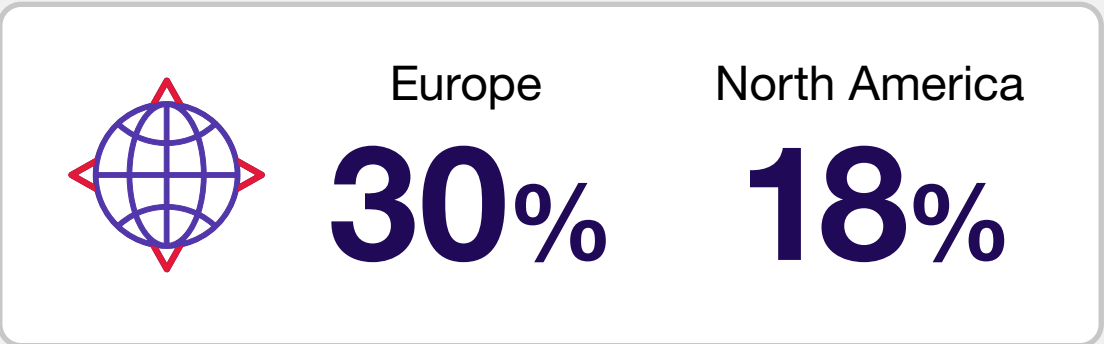
Additional insights

What do digital leaders do differently?

[Learn more](#) →

Shift in the world economic order

Including in-region repatriation for the delivery of goods and services



A shift in the world economic order is resulting a growing imbalance between Chinese and American standards. This is reinforcing the European Union’s ability to stay engaged with both countries while leading on select topics that best protect its interests.

While these major macro trends affect all industries to varying degrees, each industry requires a different response.

Read more in our white paper, “The trends shaping our future.”

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